

CSC Adopted: October 2001 , CSC Revised: _____**Class Title: Income Tax Auditor - COR****BRIEF DESCRIPTION OF THE CLASSIFICATION:**

Prepares income tax forms, processes tax returns and acts as a liaison between taxpayers and the department of taxation. Processes payments, provides customer service and performs other duties as required.

ESSENTIAL FUNCTIONS:

This information is intended to be descriptive of the key responsibilities of the classification. The following examples do not identify all duties performed by any single incumbent. Specific requirements of individual positions are described in the Job Description.

Physical Strength Code		ESSENTIAL FUNCTIONS
1	S	Prepares income tax forms by determining the type of form to file, extracting information from tax return and supporting documents, entering data into tax preparation software, and assembling the return with required attachments.
2	S	Processes tax returns and payments by reviewing tax returns, verifying forms with information in the computer system, checking for and correcting errors, resolving conflicts with taxpayers' accounts, consulting with taxpayer when necessary, coding tax returns for Department of Taxation, creating a bill in the system, sending copy of bill to treasurer and taxpayer, collecting funds, issuing receipts, and sending payments to treasurer.
3	S	Provides customer service by fielding telephone inquiries and resolving issues, processing correspondence and billing, assisting taxpayers with tax planning, and providing requested information to the taxpayers.
4	S	Performs other duties by preparing various reports, compiling graphs, charts, and maps, ordering or downloading tax forms from the Internet and providing assistance to other departments as needed.

CSC Adopted: October 2001 , CSC Revised: _____**CLASS REQUIREMENTS:**

CLASS REQUIREMENTS	
Formal Education / Knowledge	Work requires broad knowledge in a general profession or technical field. Knowledge is normally acquired through four years of college resulting in a Bachelor's degree or equivalent
Experience	Four years experience in tax preparation.
Certifications and Other Requirements	N/A
Reading	Work requires the ability to read manuals, correspondences, tax returns and letters.
Math	Work requires the ability to perform general math calculations such as addition, subtraction, multiplication and division.
Writing	Work requires the ability to write letters and tax returns.
Managerial	N/A
Budget Responsibility	N/A
Supervisory / Organizational Control	Work requires the occasional direction of helpers, assistants, seasonal employees, interns, volunteers or temporary employees.
Complexity	Work requires analysis and judgment in accomplishing diversified duties. Work requires the exercise of independent thinking within the limits of policies, standards, and precedents.
Interpersonal / Human Relations Skills	Contacts others within the organization. These contacts may involve similar work units or departments within the City which may be involved in decision making or providing approval or decision making authority for purchases or projects. Works with individuals outside the City who may belong to professional or peer organizations. Working with various state and federal agencies may also be required. Vendors and suppliers may also be called upon for information on purchases, supplies or products. Meetings and discussions may be conducted with customers, brokers and sales representatives.

CSC Adopted: **October 2001** , CSC Revised: _____**OVERALL PHYSICAL STRENGTH DEMANDS:**

Sedentary	X	Light	Medium	Heavy	Very Heavy
S = Sedentary Exerting up to 10 lbs. occasionally or negligible weights frequently; sitting most of the time		L = Light Exerting up to 20 lbs. occasionally, 10 lbs. frequently, or negligible amounts constantly OR requires walking or standing to a significant degree.	M = Medium Exerting 20-50 lbs. occasionally, 10-25 lbs. frequently, or up to 10 lbs. constantly.	H = Heavy Exerting 50-100 lbs. occasionally, 25-50 lbs. frequently, or up to 10-20 lbs. constantly.	VH = Very Heavy Exerting over 100 lbs. occasionally, 50-100 lbs. frequently, or up to 20-50 lbs. constantly.

PHYSICAL DEMANDS:

C = Continuously 2/3 or more of the time.	F = Frequently From 1/3 to 2/3 of the time.	O = Occasionally Up to 1/3 of the time.	R = Rarely Less than 1 hour per week.	N = Never Never occurs.
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This is a description of the way the job is currently performed; it does not address the potential for accommodation.

PHYSICAL DEMANDS	FREQUENCY CODE	DESCRIPTION
Standing	O	Assisting at the counter
Sitting	C	Desk work, answering telephone
Walking	F	To other stations
Lifting	O	Files, boxes
Carrying	O	Files, boxes
Pushing/Pulling	O	File drawers
Reaching	O	For forms and supplies
Handling	F	Paperwork
Fine Dexterity	F	Computer keyboard, calculator
Kneeling	O	Filing in lower drawers
Crouching	O	Filing in lower drawers
Crawling	N	
Bending	O	Retrieving items from lower shelves
Twisting	O	From computer to telephone
Climbing	O	Step stool
Balancing	N	
Vision	C	Reading, computer monitor
Hearing	C	Communicating with personnel and taxpayers and on telephone
Talking	C	Communicating with personnel and taxpayers and on telephone
Foot Controls	N	
Other (specify)	N	

CSC Adopted: **October 2001** , CSC Revised: _____**MACHINES, TOOLS, EQUIPMENT, AND WORK AIDS:**

Copier, fax machine, calculator, telephone, computer, Windows 95

ENVIRONMENTAL FACTORS:

D = Daily	W = Several Times Per Week	M = Several Times Per Month	S = Seasonally	N = Never
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HEALTH AND SAFETY		ENVIRONMENTAL FACTORS	
Mechanical Hazards	N	Dirt and Dust	N
Chemical Hazards	N	Extreme Temperatures	N
Electrical Hazards	N	Noise and Vibration	D
Fire Hazards	N	Fumes and Odors	N
Explosives	N	Wetness/Humidity	N
Communicable Diseases	N	Darkness or Poor Lighting	N
Physical Danger or Abuse	N		
Other (see 1 below)	N		

PRIMARY WORK LOCATION	
Office Environment	X
Warehouse	--
Shop	--
Vehicle	--
Outdoors	--
Other (see 2 below)	--

(1)

(2)

PROTECTIVE EQUIPMENT REQUIRED:

None

NON-PHYSICAL DEMANDS:

C = Continuously 2/3 or more of the time.	F = Frequently From 1/3 to 2/3 of the time.	O = Occasionally Up to 1/3 of the time.	R = Rarely Less than 1 hour per week.	N = Never Never occurs.
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NON-PHYSICAL DEMANDS	
Time Pressures	F
Emergency Situations	R
Frequent Change of Tasks	F
Irregular Work Schedule/Overtime	O
Performing Multiple Tasks Simultaneously	F
Working Closely with Others as Part of a Team	F
Tedious or Exacting Work	O
Noisy/Distracting Environment	F
Other (see 3 below)	N

(3)